

# Appendix A-7

## How-To: Special Events

### Special Advantages of Special Events:

1. Builds trust and confidence in agency by providing a forum for *personal contact* between members of the public and agency individuals.
2. Can *target key individuals* in key publics by inviting them to attend or participate.
3. Can provide *detailed information on complex subjects* to people individually.
4. Provides *news making event* to increase exposure to agency by pre-event publicity and post-event news coverage
5. *Success can be measured* by:
  - (a) number of people who attend;
  - (b) subjective feedback from those who attend.
  - (c) news coverage

### Caution!

Special rules and regulations govern the use of government funds for certain expenditures often included in hosting Special Events (such as food, beverages, prizes, etc.). Be sure to review guidance in appendices that follow for details.

### Appendices

A-7 a. Manual Chapter 042 FW 1 Dedications and Special Events

A-7 b. Handbook for Dedications and Other Special Events

A-7 c. Special Events  
From R-1 Field Guide to Outreach

## **042 FW 1.1 Dedications and Special Events**

**1.1 Purpose.** The purpose of this chapter is to provide guidance on dedication ceremonies and other special events.

**1.2 Scope.** This chapter applies to all public events involving Service facilities, programs, or authorities regardless of the event's sponsor.

### **1.3 Policy.**

**A.** It is the policy of the Service to encourage appropriate recognition of special events involving Service facilities, programs, and authorities.

**B.** All such events should be properly coordinated, and employees are expected to use sound judgment in planning and carrying out public ceremonies.

**C.** Care shall be taken during periods of political election campaigns to ensure that events involving public funding, facilities, and employees are not used for partisan purposes.

**D.** Care shall also be taken to ensure that public events are not used, directly or indirectly, to lobby Congress for new authority or appropriations.

**1.4 Definitions.** Special Events for the Service include ceremonies recognizing:

**A.** the establishment of refuges, hatcheries, and other Service facilities;

**B.** the signature or other form of approval of significant agreements, reports, or other documents involving Service authorities, facilities, or programs;

**C.** anniversaries, accomplishments, and other milestones involving Service authorities, facilities, or programs;

**D.** ground breaking ceremonies for new construction;

**E.** the opening of trails, observation areas, fishing piers, outdoor classroom areas and like facilities.

### **1.5 Responsibilities.**

**A.** The Director is responsible for approving all ceremonies and public events of national significance.

**B.** The Assistant Director - External Affairs (DD-EA) is responsible for advising the Director on the involvement of Departmental and congressional officials and for approving the Handbook for Dedications and Other Special Events.

**C.** The Office of External Affairs (EA) is responsible for coordinating participation by Departmental or other Executive Branch officials in all ceremonies and special events, and for coordinating news media coverage of events of national significance.

**D.** The Office of EA is responsible for maintaining the Handbook for Dedications and Other Special Events.

**E.** Each member of the Directorate is responsible for ensuring compliance with the provisions of this chapter, and for approving and providing overall direction on ceremonies and other public events under their jurisdiction.

**F.** Based upon the subject matter, the local facility manager or the division or office chief with the appropriate programmatic expertise is responsible for working with their Regional or National EA office to coordinate participation by nongovernmental organizations and for making all technical and physical arrangements.

## **1.6 Procedures.**

### **A. Approval.**

1. For dedications and ceremonies of national significance, the responsible member of the Directorate shall submit a request for approval to the Director, through AD-EA, setting forth the justification and the proposed date, location, organizations and public officials to be involved, and designating a coordinator for the proposed event.
2. Regional Directors may approve events of less than national interest, but AD-EA shall be advised of events that may offer good speaking opportunities for the Director, Assistant Secretary, Secretary, or other officials.
3. AD-EA shall advise the Director of any additional recommendations concerning proposed events, particularly with respect to involvement by other Departmental or Executive Branch officials.
4. If there is any doubt as to the propriety of any proposed event or any expenditure related thereto, the Office of the Solicitor should be consulted.

### **B. Invitations.**

1. In all cases of public events of national significance involving Service facilities or programs, the Director will be given the opportunity to participate and to invite participation by other Executive Branch officials.
2. The Governor of the affected State and all appropriate Members of Congress (MCs) should be invited to public events involving Service facilities or programs, including both Senators and the Representative for the district in which the event will take place, as well as any other Member(s) who may have an interest in the event. If the Governor or any MC indicates an intention to attend, AD-EA should be notified promptly.
3. If the event is related directly to legislative authority or to appropriations, it may be appropriate to invite the chairperson and ranking minority member, and possibly the staff as well, of the committees and subcommittees involved.

4. Whenever possible, letters of invitation to MCs should be sent early in the event planning process -- at least 6-8 weeks in advance of the event.
5. Invitations should be addressed to the Washington offices of MCs, with copies to any of their associated field offices.
6. Approximately, 7 working days after the invitations are mailed, a phone call should be placed to the appointment secretary of each MC representing the area where the event will be held to inquire about participation. Such calls should be made by the person coordinating the event or the Regional Congressional Affairs Specialist (if event is not of national significance) or by the Washington Office of Congressional and Legislative Services.
7. Whenever possible invitations to special interest groups; state, county, and local officials; volunteers and friends; and others should be sent 2-4 weeks in advance of the event.

### **C. Protocol.**

1. Each elected official who wishes to do so should be given the opportunity to address the gathering.
2. Caution should be exercised in designating any elected official as the keynote speaker or master of ceremonies when other officials or Executive Branch officials plan to attend.
3. Unless circumstances clearly dictate otherwise, the normal rules of protocol should be observed for the order in which elected officials appear on the program. See the Handbook for further information.

**D. Followup.** Following the event, thank-you letters should be sent to all speakers listed on the official program. The employee coordinating the event should draft such letters for signature by the Regional Director or by the Director, as appropriate.

### **1.7 Expenses.**

**A. Application of Appropriations.** Pursuant to 31 U.S.C. 1301 the expenditure of funds for dedications and other special events is permissible only to the extent that it is:

1. specifically authorized by law, or
2. otherwise "... necessary or proper or incident to the proper execution ..." of purposes authorized by law [(6 Comp. Gen. 619, 621 (1927)); and
3. not prohibited by law.

**B. "Necessary expenses" include those which are:**

1. necessarily incident to accomplishing an objective authorized by law, and not otherwise prohibited by law, or

2. "current or running expenses of miscellaneous character arising out of and directly related to the agency's work"--this broad category may include salaries.

C. The General Accounting Office in its Principles of Federal Appropriations Law (Office of the General Counsel, Volume 1, July 1991) provided the following guidance:

1. Entertainment Expense. Appropriated funds may not be used for entertainment or refreshments unless specifically authorized by statute and approved by the proper administrative officers (pages 4-82 through 4-84).
2. Gifts and Awards. Section 115 of Pub. L. 102-154 provides agencies of the Department of the Interior with permanent authority to purchase and give "nonmonetary awards of nominal value to private individuals and organizations that make contributions to Department of Interior programs." The Interior Solicitor's office advises that the Office of Government Ethics twenty dollar (\$20) exception be used (5 CFR 2635.204) to define "nominal value."
3. Publicity, propaganda and self-aggrandizement. Many annual appropriations bills contain prohibitions on expenditures for publicity or propaganda that is not expressly authorized by law and cannot otherwise be justified as necessary expenses, particularly activities whose obvious purpose is "self-aggrandizement" (pages 4-161 through 4-166).
4. "Traditional" Ceremonies. Expenditures which might otherwise be prohibited may be permissible when they are incurred incident to certain traditional ceremonies (pages 4-214 and 4-215).
5. Ground Breaking Ceremonies. GAO specifically mentions these events as legitimate for the expenditure of appropriated funds. Expenses associated with ground breaking ceremonies are included in construction costs.

**1.8 Handbook.** Detailed guidance and suggestions on planning and conducting dedication ceremonies and other special events is contained in the Handbook for Dedications and Other Special Events, which is available from External Affairs.

## **Handbook for Dedications and Other Special Events**

### **Special Event Management**

The U. S. Fish and Wildlife Service frequently has opportunities to host special events commemorating anniversaries; dedicating new facilities such as visitor centers, trails, and office buildings; celebrating land acquisitions; publicizing ground breakings; and recognizing national or international observances such as National Wildlife Refuge Week and International Migratory Bird Day. Large or small, these events require detailed planning and coordination. This Handbook provides guidance to assist you with the many steps involved in creating a successful event and includes sample invitations, programs, letters, sample certificates, event photographs, and a checklist to help guide you through the process.

Special events promote the work of the Fish and Wildlife Service. In conjunction with local or national observances, these events provide opportunities for field stations to increase their visibility within the community and, as former Service Director John Gottschalk wrote years ago, "allow citizens to see the physical evidence of tax expenditures." The General Accounting Office cites "the obligation in a democracy" for agencies to keep the public informed about their activities. By encouraging public participation, as well as cooperation with other agencies and organizations, special events foster good community relations and generate a constituency of supporters who may continue their involvement long after the event has been held.

Field stations play an important role in recognizing occasions that lend themselves to developing special events. Ground breaking for a new facility or commemorating its opening, completing a major project, observing a national celebration such as Earth Day, and acquiring land or establishing a new refuge, hatchery, or lab are all occasions for holding a special event. Special events may highlight annual activities such as waterfowl migration, or they may be suggested by elected officials, political dignitaries, conservation organizations, or community groups.

### **Procedures and Guidance**

The Fish and Wildlife Service Manual Chapter 042 FW 1, Dedications and Special Events, provides guidance on policy, responsibilities, protocol, and application of appropriations related to special event management. All employees engaged in event management have a responsibility to be familiar with this Chapter and to follow agency policy and procedures.

Field offices must coordinate with their appropriate Regional Office supervisor in scheduling and planning events. In addition, the External Affairs (EA) Office must be notified of potential events and consulted where VIPs such as Members of Congress and staff, Washington Office staff, and members of the Regional Directorate will be invited to attend.

### **Initial Planning**

For major events, early planning is essential. Allow lead time of at least three, and as many as six months, to plan, publicize, and carry out your event. When you have an opportunity to stage an event, there are several things to establish up-front. First and foremost, designate an event coordinator. If the event is located at a field office, the Project Leader or Outreach Specialist is often the most appropriate individual to fill this role. The coordinator will serve as the primary

point of contact for all details related to the event. Coordinators should develop a timeline of tasks and accomplishment dates and oversee the completion of these assignments.

Where partners are involved in staging events, coordinators may find it helpful to establish an event committee. Such a committee can help make decisions and provide for a better coordinated event. Regardless of whether a committee is formed, the coordinator should routinely brief all staff members involved with supporting the event.

The next step is to select a date for your event. To avoid scheduling conflicts with other local activities, contact your area tourism department or chamber of commerce for a listing of public events on or around the event date being proposed. Consult national or regional EA staff to ensure there are no Service conflicts that will interfere with this date. These inquiries will save time later and increase the likelihood of a good turn-out. Remember that in most cases, scheduling the event on a Saturday or Sunday increases attendance. Also, consider hosting events around seasonal wildlife occurrences such as waterfowl migration or nesting or annual hatchery activities. These seasonal events will provide a backdrop for telling the agency story and increasing awareness about the work of the Service.

Determine the event location. Will it be held on Service lands or will a non-Service location be involved? Coordination will be required for events held on State, city, or other Federal lands. Permits may be needed and special conditions for use may be in effect. These details must be considered early in the planning process.

In addition, the size of an event is determined not only by its importance, but also by the amount of staff, volunteer, and community assistance available. Bigger is not always better. A small, well developed event may be more appropriate than a large, loosely organized affair.

Another very important aspect of event planning is to determine who the event VIPs will be. Larger events usually include a formal ceremony with well-known guests. Identify these individuals and make calls early to obtain their available dates and times to prevent changes and delays further into the planning process. For Members of Congress, calls should be placed to the appropriate Scheduler in either the District or Washington office. These calls can be placed by the Project Leader if he or she has a good working relationship with the Member's office. Otherwise, assistance in notifying and scheduling Member participation can be provided by EA at the Regional level. Other high-level officials requiring early notification include the Governor of the State, the agency Director or Regional Director, and the Mayor or Town Manager.

Once you have designated a coordinator, set a date, identified and notified the VIPs, and secured a site for the celebration, it is time to begin planning the specific details of the event. At this point, the following areas must be considered:

- Event Funding
- Invitations
- Program Development
- Speeches and Special Activities

- Publicity
- Grounds and Event Set-up
- Support Services
- Post-event Details

### **Event Funding**

Partnerships and close association with volunteer and friends groups are critical to the success of many Service activities. No where is this any more apparent than when the Service hosts special events. Funding and staffing constraints necessitate volunteer assistance and support from organizations, foundations, private citizens, and local community agencies and groups. In general, unless specifically authorized by statute or as a "necessary expense," Federal law prohibits the use of appropriated funds for expenses including food, entertainment, guest lodging and transportation. A non-Service group of supporters can provide donations and assist with such event costs.

The Office of the General Counsel, U.S. General Accounting Office (GAO), has created a reference about allowable expenditures in its Principles of Federal Appropriations Law, Second Edition, Volume I, 1991. Expenditures that might otherwise be prohibited may be permissible when they are incidental to certain traditional ceremonies. GAO cites ground breaking and dedication ceremonies for laying cornerstones in public buildings as the most common examples of such ceremonies. Further, expenses "necessarily incident" to these ceremonies -- such as the cost of printing programs and invitations, recording a presidential speech, and taking a group photograph at the event -- are chargeable to the appropriation for construction of the building. The cost of buying flowers as a centerpiece and chrome-plating a ceremonial shovel may also be allowed.

Service Manual Chapter 304 FW 1, Procurement, states that "Federal agencies may not use appropriated funds for personal gifts except where authorized by statute." This also includes promotional items, such as mugs, key chains, lapel pins, bumper stickers, tee-shirts, caps, balloons, or candy. In a case that arose from a dedication ceremony at a Service facility, the Comptroller General disallowed expenditures for promotional mugs and trays for dignitaries and embroidered caps for volunteer security people.

For event coordinators, the important thing to remember is to be aware there are restrictions on many expenditures, particularly items such as food, entertainment, guest lodging and transportation, and gifts (including plaques). If you are uncertain or have a question, consult your Budget and Finance Officer.

### **Invitations**

Invitations are necessary to generate interest in an event and to ensure that partners, neighbors, colleagues, supporters and others who have a connection to the event are reached. Invitations are of two types -- formal letters of invitation (frequently signed by the Regional Director) to VIPs and formal invitations mailed to all others contained on the list of invited guests.

The letters of invitation are usually mailed to Members of Congress; State, county, and local Officials; and heads of other Federal agencies. Frequently these letters confirm oral agreements to participate in an event, made between a Regional representative (usually the Assistant Regional Director for EA) and a VIP. These letters are sent early in the event planning process after the VIP has been notified and the event scheduled on his or her calendar. In some instances, confirmation may not be received until closer to the event date.

Formal invitations are sent to other guests two to four weeks before the event date. Typically, about one third of the invited guests will actually attend the event. The event coordinator should work with the Regional publications coordinator to design, create, and print the invitations. Invitations are printed on high quality card stock and usually feature a cover design that is representative of the event. Details about the event -- date, time, location, and activities are provided. A map is normally included on the back cover of the invitation or enclosed as a supplement. RSVPs are sometimes requested for invitation-only events but are not recommended for public events.

All staff should be involved when preparing the guest list -- especially those who have worked at the station or host office for an extended period of time. Invite people who have a history of participation in Service activities at the site as well as volunteers, local organizations and businesses, and area dignitaries. The League of Women Voters can frequently be of great assistance in compiling a list of elected officials.

Following is a recommended list of guests to be included on the invitation list:

- Department: Secretary, Deputy Secretary and Assistant Secretary for Fish, Wildlife and Parks.
- Agency: Director, Deputy Director, Assistant Directors, Regional Director, division chiefs, project leaders and staff in the event area.
- Other Federal Agencies: Superintendents and Chief Foresters of nearby National Parks and National Forests, District Engineers of the Army Corps of Engineers, and commanding officers of nearby military bases.
- Congress: Members of Congress from the state(s) involved; associated Washington and District office staff; staff on the Senate Committee on Environment and Public Works, the House Resources Committee, and Appropriation Committees.
- State, County, and Local Officials: Governor; Director, State Fish and Game Agency; managers of State hatcheries or wildlife management areas; conservation commission members; mayors or city managers; county commissioners; town supervisors; university and college presidents; and local school principals.
- Others: Local conservation organizations, local television and newspaper reporters, representatives of local chambers of commerce, outdoor writers, contractors involved in site construction, and Service volunteers.

Typically, letters of invitation to Members of Congress, Governors, and Department and Service

leaders should be signed by the Regional Director. Field Project Leaders should send letters of invitation to the City Manager, the Mayor, City Council members, county and town officials, and directors of State natural resource agencies. For smaller, less formal events, invitations may be prepared on good quality paper, photocopied at the field level, and mailed to people and groups throughout the local area.

### **Program Development:**

The success of any event depends on the program -- usually consisting of a formal ceremony and special activities and demonstrations. The ceremony will feature important guests and speakers and is the focal point of the day. The ceremony should be completed in one hour or less with the keynote speaker making remarks of up to 15 minutes. Other speakers should be limited to no more than five minutes. All other event activities should be planned to immediately follow the ceremony.

Most ceremonies begin with a short welcoming statement delivered by the host Project Leader. The Project Leader then introduces the Master of Ceremonies (MC). Frequently, the Regional Director fills the role of MC, but a local, well-known person with good stage presence may also be asked to perform this task. The MC introduces speakers, recognizes dignitaries and special guests in the audience, keeps the program on schedule, and adds personality to the event.

Most formal ceremonies include the presentation of colors and/or the national anthem or other appropriate musical selection such as America the Beautiful. The presentation of colors is usually conducted by a military, Reserve Officer Training Corps (ROTC), Coast Guard, National Guard, or Scout color guard (be sure to include both boy and girl scouts). A school band, chorus, military orchestra, or single trumpeter may be recruited to perform the musical selection.

Although invocations and benedictions have traditionally opened and closed dedication ceremonies, these religious practices are less used today. Instead, inspirational messages and readings are being used in their place although, most programs eliminate this segment altogether.

Event organizers should give special attention to program protocol. Remarks are delivered with the most prestigious guest addressing the audience last. In most cases the final, or keynote, speaker will be a Member of Congress, the Governor, the Secretary of the Interior, the Service Director or other designated Service official, or someone who has made a significant contribution to the facility or effort being dedicated or honored. On the program agenda, you may simply list your speakers under the heading of "Remarks." The following officials may participate in event ceremonies. They are listed in descending order of precedence:

- President of the United States
- Vice President of the United States
- Governor of the state
- Cabinet Secretaries, with the Secretary of State ranking first
- U.S. Senators

- Governor of a neighboring state
- Members of the U.S. House of Representatives
- Under Secretaries, Deputy Secretaries, Assistant Secretaries of Executive Branch departments or the number two official in a department regardless of title
- Under Secretaries of Military Departments
- Four-star generals and equivalent ranked admirals, according to seniority
- State senators
- State representatives or delegates
- State executive department officials
- City and county officials

The order of precedence should be used for seating and for introductions. The lowest ranking official should speak first; the highest ranking official last.

While there is no fixed order of precedence for state and local government officials, the host should consider the purpose of the event, the level of all official guests and other significant factors in planning the seating arrangements and For example, under certain circumstances, the mayor of a large city might be placed after a U.S. Senator or Member of the House of Representatives.

Arrangements for an interpreter for the hearing-impaired should be made to help ensure that everyone fully appreciates the program.

### **Speeches and Special Activities**

For Regional events, EA oversees the development of speeches for Service dignitaries. However, the Project Leader may be asked to provide EA with a draft speech or talking points. Speeches should reflect the purpose of the event and address the benefits to be derived from the new facility or project or highlight the importance of the anniversary or national celebration. Speeches should be positive, uplifting, thought-provoking, precise, and even humorous.

Formal ceremonies are an excellent opportunity to recognize employees, volunteers, sponsors, or others who have contributed to the project or to the organization of the event. Certificates or plaques presented in this setting will be long-valued by the recipients. Formal presentations should be identified on the ceremony program as "Recognition of Volunteers" or under another appropriate heading.

Closing remarks (made either by the Master of Ceremonies or the host Project Leader) should include a thank-you to sponsors and to attending guests. The MC will also ensure that guests are well informed about the remaining day's activities. At the close of the formal ceremony, he or she will direct the audience to the site of a ribbon cutting, the unveiling of a new sign, the cutting of a

cake, or the location for boarding tour buses.

A full schedule of activities, with several occurring at one time, provides guests with options of things to do. Invite wildlife artists, decoy carvers, nature photographers, duck callers, and taxidermists to participate in the celebration and provide space for other natural resource agencies, local conservation groups and museums, and volunteer and friends groups to set up displays. In addition, wildlife management demonstrations such as bird-banding, prescribed burning, and nest-box construction can nicely complement facility tours, interpretive walks, audio-visual programs, and even living-history presentations.

Entertainment, especially music, adds a festive tone to special events. If you decide to arrange for entertainment, be sure you select something that is fitting to the occasion and appropriate to the Service. Many times, well known performers will provide their services free of charge because they support the work of the Service. Remember, entertainment is a restricted expense for which appropriated dollars cannot be used.

Throughout the day, light refreshments should be available for guests. Like entertainment, refreshments are also a restricted expense. Customarily, they are provided by a local friends group, a local civic or conservation organization, or through another donated source.

### **Publicity**

The best organized event will not be a success if attendance is poor because the word does not get out. Event coordinators should work closely with EA to outline an event plan for publicity. Typically, the plan will outline needs for a media alert, news release, public service announcements, methods and timing of distribution, and a press kit that may contain photographs, fact sheets, and other informational materials.

Approximately two weeks in advance you will want to draft a news release, media alert, and public service announcements detailing the event and describing the planned activities. Work with EA to determine the appropriate distribution schedule for these publicity items. Distribution schedules will be dependant upon media deadlines. Fax and email are quickly becoming the preferred means of reaching media markets, as is the use of the Internet. Photographs frequently enhance the appeal of a story for print media.

Brief event announcements may also be provided to publications for inclusion in their calendar of events. Sending a 30-second public service announcement to radio and television stations may reach listeners who would otherwise not learn of the event.

Immediately prior to the event, contact the news media to confirm their attendance. This will increase the likelihood of media attendance. If you have relationships already established with local reporters, these will prove invaluable to both your pre-event publicity efforts and your attempts to obtain press coverage on the day of the event. However, it is always wise to take notes and photographs of the day's activities so these can be provided to the media if they are unable to attend the event. Be sure to include details about attendance numbers, special guests, activity highlights, unusual happenings, and a brief statement from a Service official.

On the day of the event, designate a press table in a highly visible area that can be easily found by

media reporters. Ask attending reporters to sign in and identify their media affiliation. Press packages should be provided to them, and a well-informed Service representative should be available to respond to questions they may have. If you anticipate that many reporters will cover the formal ceremony, consider designating a press area in the audience, close to the front, in order to accommodate photographers and videographers.

Don't rely solely on the media to publicize the event for you. If you do, you might be disappointed by the results. Public notification should be made in a variety of ways. Think about things that can be initiated by you and your office. Consider the development and posting of flyers, the use of banners, and mailing announcements to individuals who have requested their names be placed on Service mailing lists.

### **Grounds and Event Set-up**

Large events with formal ceremonies that may attract several hundred, or even several thousand people require preparation. The event coordinator may need to plan for the rental of tents, chairs, stage construction and decorations, power, signs, parking, shuttle transportation, a sound system, lights, portable toilet service, emergency fire and medical equipment, tables for refreshments and exhibitors, photography and video-taping, access for disabled guests, grounds maintenance and mowing, preparation and leveling of tent sites and clean-up.

News releases and posted flyers should contain clear directions to the event, including an easy-to-read map. Signs should direct guests to the parking area and event site. Where parking is limited or located away from the event site, shuttle bus transportation may be required. Parking for VIPs, the media, and handicapped and special guests should be provided close to the event site, convenient to the stage.

Always plan for rain. If you have an indoor facility large enough to accommodate many guests, consider using it in the event of rain. Large canvas tents may also be rented in varying sizes for the formal ceremony and for exhibitors and food. Even when rain is not anticipated, tents are frequently used. The shelter they provide serves as a protective break against wind and sun. Most tents have sides that can be rolled up on clear days and easily dropped for inclement weather. Event planners everywhere will tell you, "tents are essential." Include the cost of renting tents in your event budget.

One of the most important aspects of set-up is the formal stage. Stage platforms can be constructed from scratch or can be created with the use of risers or pre-fabricated, elevated flooring. It is important that the stage be elevated so the view of guests seated in back rows is not obstructed. Depending on the height of the stage, steps may need to be included in the design. When completed, raw staging should be painted or covered with indoor-outdoor carpeting. Potted plants, shrubs, and flowers can be used as decorations in front of the stage. These items can often be borrowed from a local garden center or nursery. Skirting may also be used around the base of the stage to create a formal look and to conceal stage supports.

Comfortable and attractive chairs should be placed on the stage for the speakers. Their names should be attached to the chair backs to avoid confusion. A podium with a high quality sound system is positioned on the stage; the Service emblem prominently displayed on the front surface.

Place ice water and glasses behind the podium for use by the speakers.

The American flag and Department of the Interior flag customarily flank the stage. Flags must be displayed in accordance with the Flags Code, 36 U.S.C. 173-178 and 36 U.S.C. 171-172. Usually 36 U.S.C. 175 (k) will apply. It reads, "When displayed from a staff...the flag of the United States of America should hold the position of superior prominence, in advance of the audience, and in the position of honor...at the speaker's right as [s]he faces the audience. Any other flag should be placed on the left of the speaker..." Most color guards will bring flags to use for the presentation of colors and will exit with those flags when the processional is completed. Occasionally, a color guard may elect to use flags that will remain on stage following the presentation. The event coordinator will need to work these details out with the color guard prior to the event.

In some areas, spotlights will be required to illuminate the stage and speakers. In such cases, be sure to test the lighting and ensure that it does not blind the speakers. Be sure to consider your needs for electrical service for this and for providing power to the sound system and exhibit area. Test the equipment several times prior to the start of the event to minimize operational difficulties during the ceremony. Furthermore, be aware of tripping hazards that may result from electrical cables running over walkways; make sure they are well secured and unlikely to cause injury to invited guests. In remote areas where electrical service is not available, portable generators or battery operated equipment may be used.

Make early arrangements for chairs and tables The event could require that you provide several hundred seats. Churches and fire halls will frequently loan folding chairs and tables if they are not being used. Otherwise, you may need to rent them from one or more vendors. Regardless, you will want to line this up sooner rather than later. This is an area where you may realize that organizing a special event is a test not only in good planning but also in creativity, flexibility, and endurance!

### **Support Services**

A large public event requires that issues pertaining to safety be carefully considered. The local rescue squad should be alerted about the event and to the potential for emergency medical situations. The squad should be informed about the date of the event, the number of people expected, the location of activities, and the time period in which the event will be held. Local police and fire departments should be notified of the event and, when possible, Service law enforcement officers should be on-duty to assist with crowd control and to help ensure a safe environment. If activities are spread out over a large area, a base radio station should be established and staffed throughout the day. Designated employees or volunteers should have portable radios in order to communicate with the base station in the event of an emergency. First-aid kits should be fully stocked and available at various locations during the event.

Service law enforcement officers should be consulted on all issues related to public health, safety, and access. They may also be asked to assist with parking, general information, and directions. Employees having law enforcement authority are well-suited to deal with emergency situations that may arise during the event. Access routes for fire and ambulance service must be designated and maintained for quick entry and exit without interference.

Event hosts should designate parking, seating and other areas to ensure access to disabled guests. Staff should also be designated to direct traffic, assist with parking, and to shuttle or guide all visitors to the event area. Access routes must be well maintained and free of mud, soft sand, and overhanging vegetation. Be sure to avoid the use of areas where septic tanks and underground water or drainage facilities could be damaged by parked or moving vehicles. Adequate parking must be provided close to the event site or at a suitable location from which guests may be quickly transported in shuttle vehicles. If needed, parking areas and spaces can be easily designated with the use of signs, lime, rope, and stakes.

Parking and directional signs must be developed and installed prior to the event date. Ensure the signs are neatly prepared and that the wording is large enough to be read from a moving vehicle.

### **Post-event Details**

After the guests and dignitaries depart, there is still much work to be done. Enter the clean-up crew to break down the stage and exhibits; load and return the tables, chairs, and other borrowed equipment; and dispose of all trash. Promptly after the event, thank you letters should be sent to speakers, sponsors, entertainers, exhibitors, volunteers, and other participating organizations who helped make the event a success.

A few days following the event, gather together everyone who had been involved with staging the event to critique the effort. What went well? Where could changes be made next time? Did anyone receive complaints or complements? Discuss them, share ideas, and make notes for the future.

Follow up with local reporters to ensure they have enough information to prepare an accurate account of the celebration. If not, offer to provide them with more details or to prepare a news release. Also offer copies of photos that were taken on the day of the event for their use in preparing an article.

These post-event details will provide a sense of closure for the organizers and volunteers and hopefully leave everyone with positive memories and satisfaction for a job well done. The importance of these final tasks should not be minimized.

## **Task Checklist for Special Events**

### **Pre-event**

- Designate an event coordinator
- Meet with staff, partners, and form committees
- Check on local event schedules
- Consult EA about upcoming FWS events
- Select an event date and place (include rainday alternatives)

Secure permits (fire, building, assembly, police, health and sanitation, where needed)

Advise EA and local information centers of event date

Confirm availability of VIP speakers

Issue confirmation letters through EA to VIP speakers

Arrange VIP lodging

Arrange VIP transportation

### **Event Funding**

Outline FWS event expenditures

Establish budget

Designate support group to handle donations and non-FWS funding

### **Invitations**

Develop guest mailing list

Coordinate development, design, and production of invitation with RO Publications  
Coordinator

Distribute invitations to local dignitaries and the public

### **Program**

Develop program for event which may include:

- formal ceremony
- activities
- exhibits
- guided walks
- tours
- demonstrations
- entertainment
- refreshments
- ribbon cutting
- sign unveiling
- ground breaking
- presentation plaque or certificate

Prepare talking points or draft speeches

Select color guard and vocalists

Arrange for interpreter for hearing impaired

Design and produce program brochure and select staff to distribute

Reserve needed exhibits and arrange to have them staffed on day of event

Plan activities, walks, tours or demonstrations, and assign staff. Do a rehearsal, if needed

Select cover to unveil sign

Obtain ribbon and shears for ribbon-cutting

For ground breaking - paint shovel gold and loosen soil so it will turn easily

Design and procure plaques or certificates

Determine entertainment needs, i.e. staging, electric, tables, etc. Contract unless using volunteers

Select refreshments and determine needs, i.e. tables, skirting, plates, cups, napkins, utensils, etc. Assign staff or volunteers

### **Publicity**

Prepare media alert, press release, advance stories, public service announcements, flyers, and pitch feature stories to publicize event

Contact media to cover story on the day of the event

Select photo opportunity spot

Prepare press packages

Designate table and staff to greet and register news media

Designate FWS event photographer and videographer

### **Grounds and Event Set-up**

Select level area, mow and trim for placement of tents. Tents should be situated so sun is not in speakers' eyes

Contract for tents. (Size of tents determined by expected attendance, exhibits, and refreshment needs). Plan for rain

Podium with FWS emblem

Sound system with back-up equipment. (Contract for technician. Your event is ruined if the audience can't hear!)

Flags. Display according to "Flag Code"

Arrange for stage -- including skirting, shrubs, flowers, steps, etc.

Reserve Fish and Wildlife Service banners

Arrange for water and glasses for speakers. Podium with shelf is good

Chairs (use labels to designate speaker's chairs and other reserved seating)

Restrooms or portable toilet service (handicapped accessible)

Lights

If no electricity -- you'll need a generator

Trash receptacles

### **Support Services**

Prepare directional signs, assign staff to post

Notify local EMTs, police, and fire departments

First aid kits

Notify FWS law enforcement officer

Locate portable radios (make sure they are on same frequency)

Arrange for shuttle transportation (buses, vans, etc.)

Designate staff to direct traffic, park cars, and to shuttle or guide visitors

Designate parking, seating and other areas to ensure access to disabled guests

### **Post-event Details**

Clean-up crew - break down stage, chairs, tables, exhibits

Return borrowed equipment

Dispose of trash

Remove portable toilets

Media follow-up - provide photos, if needed

Thank you letters

Critique event

# *Special Events*

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## *Crowd Pleasers*

Organizers stage many kinds of events for many different purposes, but they all have one thing in common: Their success is judged by how well they attract and satisfy an audience.

Often, something out-of-the-ordinary happens to provide the motivation for a special event. A new facility opens and the public is invited to attend an open-house tour. A new program needs volunteers so staff members organize a program with a contest or door prize. A department receives an award so the department head organizes a banquet to celebrate.

Other special events are seasonal or annual. Employees and volunteers always need motivation so a family picnic is organized in the summer and a dinner is provided at Christmas. Every year there is a party with awards to honor volunteers. An annual or monthly "Free Day" invites the public to tour facilities that usually require admission.

Regardless of the motivation or purpose behind an event, planning is its most crucial and time-consuming aspect. Event planners need to understand every step of the planning process and be prepared to work on the hundreds of details that must be handled to produce a successful event.

- Staff involved in outreach activities
- Anyone considering producing a special event
- Anyone who works with volunteers
- Public affairs representatives
- Special events steering committees, including coordinators and members

WHO  
SHOULD  
READ  
THIS  
CHAPTER

## *How To Plan a Special Event*

### *Step 1: Write a Purpose Statement*

Your first task is to determine your purpose for producing the event and create a statement to express it. A good purpose statement should be written as a benchmark to which you and your staff can refer throughout planning and staging the event. Purpose statements are also useful for gaining the interest and support of higher authorities within your agency, cooperators, partners, and sponsors.

One way to develop a purpose statement is to incorporate the event's goals, such as:

- Maximize volunteer involvement
- Develop and strengthen networks
- Create leisure, enjoyment opportunities
- Foster community support and pride
- Strengthen local organization and leadership
- Maximize economic benefit (make a profit)
- Spread benefits among area residents
- Contribute to a community's quality of life
- Raise the agency's image
- Gain new, non-traditional users/buyers/supporters
- Communicate messages to a target audience
- Raise funds for a specific program or project
- Recruit volunteers or employees
- Foster a sense of community among employees (e.g. award events)
- Promote community participation, involvement, and understanding

► **SAMPLE PURPOSE STATEMENT:** The Day at the Refuge Festival will communicate our agency's messages to the target audience, help gain new non-traditional users for the refuge, and raise the agency's image by offering a variety of free, leisure-time opportunities that can be enjoyed by people of all ages.

### *Step 2: Identify Potential Markets*

Since the main criteria used to assess the success of a special event is whether it attracted a sizable audience, you will want to be sure there is an adequate market for your event.

**OUTREACH****Special Events**

The best way to investigate marketability is to talk to the people you think are potential customers. Through their comments, you will be able to identify their expectations and needs and plan your event to meet them.

After your first few interviews, you will know which questions to ask to determine which benefits will attract the most customers. You might want to prepare a benefit checklist and run through it with each of your contacts, asking them to rate each benefit. Some typical special event benefits are:

- Fun
- Excitement
- Education
- Socializing,
- Personal fulfillment
- Cultural enrichment
- Convenience
- Free gifts

Make sure audience profiles also include the basics (called demographics): age, income, sex, where they live and work, occupation, what ethnic groups they belong to, political beliefs, and personal interests.

**The more you know about the people in your target groups, the easier it will be to create a mix of activities that will satisfy them.**

✌ Rule of Thumb

### *Step 3: Solicit Cooperators and Sponsors*

Since special events can be costly and time-consuming to stage, it's always a good idea to consider involving cooperators and sponsors. Look for supporters who will contribute to the credibility of the event and your agency as well as provide financial support. Involve them early in the planning process since their goals or needs may effect planning.

Look for potential supporters in the following groups:

- Friends
- Suppliers
- Funding sources
- Corporate executives
- Politicians
- Media personalities
- Local community leaders
- Impacted communities
- Associated businesses
- People with interest in your agency's mission

**Seek cooperators and sponsors that will add to the credibility of the event and help improve the public image of your agency.**

✌ Rule of Thumb

#### *Step 4: Define the Event's Main Theme(s)*

An event's theme(s) should be simple, each stated in just one or two sentences. To develop strong special event themes, use the following criteria:

- Review your agency's mission statement and incorporate its values.
- Consider what you learned about potential markets and phrase the theme in terms of the benefits the event will deliver to your market.
- Make sure your concepts or main ideas allow for a variety of interesting and promotable activities.
- Try to choose themes that create a unique identity for the event.

► **SAMPLE THEME:** Wildlife viewing is a fun, educational activity that can be enjoyed by every member of the family at a refuge close to home.

#### *Step 5: Set Objectives*

For most events, two types of objectives are established: financial and non-financial. To establish financial objectives, you will weigh the costs of staging the event against what the event can be expected to bring in. When you determine your event's budget (see Budgeting below), you will also project if it's likely to be profitable.

Keep your financial objectives as realistic as possible. An objective that is within reach, reasonable, and achievable will have a much greater chance of giving everyone involved in staging the event a sense of positive accomplishment.

Non-financial objectives for events are more individualized because they include indicators that require feedback from discussion with committee members or participants. Some examples of non-financial objectives are:

- Increase the quality and quantity of volunteer participation.
- Increase markets in the agency.
- Increase visibility of the agency or its programs.
- Increase goodwill from the community.

**OUTREACH****Special Events**

Non-financial objectives can also help develop strategies for how you and your staff need to function before, during, and after an event. For example, if you determine that one of your major objectives is to enlarge your constituency base, then your strategies might include:

- Asking those attending the event to give their names and addresses for possible follow-up.
- Offering a prize if they complete information in a prepared form that you will use later for recruitment purposes.
- Offering a take-home description of your agency's mission, goals, or projects.
- Asking staff to mingle with the audience and discuss the benefit of supporting the agency.

*Step 6: Consider Timing*

Timing is one of the most crucial elements to consider when planning a special event. Consider the following before you choose a date for your event:

- Analyze what else may be happening in your community that could affect participation in your event. Make sure other events will not compete.
- Assess which times of the year are best for the event, based on seasons, when you need a response from participants, or who you hope will attend.
- Consider whether there's a special time within your agency, such as an anniversary, that provides a reason to hold an event and will help draw attention from the media and the public.
- Allow time for careful planning and effective promotion.

You may want to look into packaging your event with other special events that could help you penetrate wider markets, attract more attendance, or make your event more worthwhile to visitors. Packaging can also help reduce costs and help you secure support from the community and sponsors. To learn about event packaging opportunities, talk with representatives from the local hotel industry, tourism organizations, travel bureaus, and other agencies.

If your staff is inexperienced, undertake a smaller, manageable event before taking on a major, ambitious one, and allow more time to stage the event.

☺ Rule of Thumb

## OUTREACH

## Special Events

*Step 7: Design a Mix of Activities*

Planning the components of your event involves determining what people will do, see, hear, or learn. Whatever mix of activities you choose, remember to keep it simple. It is difficult for people to do more than one thing at a time. They overwhelmingly prefer a few well-orchestrated elements over a bunch of poorly planned and staged activities.

For every activity you consider, keep your audience's expectations in mind. Make sure each activity you choose helps meet an expectation and that it is aligned with your agency's mission and your event's themes. A simple way to do this is to ask how each activity will help you achieve one or more of your objectives.

To create the best mix of activities, also consider the following:

- Is there potential to bring in profit?
- Is this activity likely to attract free publicity (earned media)?
- Will agency members or staff be interested in volunteering their efforts?
- Could this activity contribute to an annual event?

After you have chosen your activities, create an activities list and use it to organize your efforts. Every activity will require pre-event preparation, displays and facilities, printed materials, publicity, an organizer (see Steering Committee below), and follow-up. A useful way to list the requirements for each activity is to prepare a chart that describes the tasks associated with each area.

## ►SAMPLE ACTIVITIES CHART:

ACTIVITY	Pre-event preparation	Displays/facilities	Printed materials	Publicity	Organizer	Follow-up
Animal food booth	Find a source; arrange for purchase, delivery, and site storage	Decorate a table, supply 5 bins with scoops and small recyclable paper bags, set up a sign-up sheet for people who want to be on a mailing list	Make a large sign and a leaflet describing food, prices, and wildlife needs	Promote: feeding wildlife appropriate foods is an educational activity for children	Assign one person to schedule volunteers to staff the activity	Donate leftovers to refuge; keep count of bushels sold; add names of those who signed up to refuge/agency mailing list

### *Step 8: Develop a Budget*

Creating a budget for your event is a challenging process because you must often accurately estimate all expenses and income, for activities that have never been tried before. Your goal is to control costs, making sure that money is not spent excessively while providing the greatest potential to attract audiences and cover costs or bring in revenue.

To begin, create a list of the activities you are planning and estimate the costs for each. Then carry these costs onto a comprehensive list that covers costs for promoting and staging the entire event. Be sure to include administrative costs, such as phone calls, letters (stationery and stamps), travel, staff time, and office overhead costs (office rental, business machines). Add in an amount for "contingency," usually ten percent of the entire budget.

Prepare another list specifying all of your potential revenues. Include estimates for revenue you expect to bring in from each activity. Also list the funds you expect your agency to provide, revenues other than cash income that you expect to receive, such as the donation of printing of leaflets, and sponsor contributions. Add up your expected revenues and balance them against your expected expenses.

If your budget analysis shows you will not be able to earn enough income to cover your costs, consider seeking corporate sponsors to underwrite some of your costs. If you are successful in attracting enough sponsorship, you may have the option of opening the event to the public free of charge or increasing your profits. Don't forget: Sponsorship can also take the form of gifts of goods and services. Be sure to tell your sponsors how they will receive full recognition for their support and plan special media campaign(s) or display(s) to give them exposure.

Take advantage of working with volunteers to minimize costs. Using volunteers will help your agency expand its support base and is usually looked upon favorably by funders and sponsors.

**The genuine enthusiasm and commitment volunteers bring to an event cannot be matched.**

 Rule of Thumb

### *Step 9: Choose a Steering Committee and Coordinator*

Look for a steering committee coordinator or chairperson who is capable of undertaking the entire project and focusing on planning specifics. Since the coordinator is usually the driving force behind the success of an event, try to find someone who will be a strong, hardworking, and respected leader, and is skilled in public relations.

Each member of the steering committee should have some knowledge of agency policies, programs, and services. Members must be able to cooperate and plan intelligently so each should have a good sense of timing, organization, and detail. Other qualities, such as persistence, patience, and sense of humor, are also helpful.

The coordinator is responsible for leading the group in preparing objectives, assigning job descriptions to each member, and seeing that members' wishes are carried out. The coordinator also interact with all of the staff and volunteers who help plan and stage the event, so be sure to inform them of the coordinator's role and authority.

### *Step 10: Create a Timeline*

A timeline consists of tasks and activities displayed on a chart. Timelines work well for committees because they help members monitor their project's progress visually. They are comprehensive, easy to prepare, simple to revise, and an effective tool for use in meetings.

One way to create a timeline is to draw up a table. List the weeks or months before the event across the top. Then list all of the event's activities down the first column. Use horizontal lines to graphically show the beginning and end of each activity (See Worksheet). Color coding can be used to indicate who is responsible for each task or to prioritize tasks.

### *Step 11: Choose a Site*

During your planning process, tape a list on the wall where committee members and others can jot down site facilities required for the event. Use this list to evaluate sites for essential factors, such as crowd capacity and electrical power. Also consider safety and accessibility factors. Look for a site with an attractive appearance and location that will enhance your agency's image. Make sure it has adequate parking that is secure.

When you have narrowed down your list of sites to just a few, find out which sites have been used for similar events and talk to promoters to see if they were satisfied with its facilities.

After you have chosen a site, develop a design for the layout of activities. Assign one committee member to deal with legal matters and insurance. Assign other members to be responsible for: site preparation, admissions, crowd control, and cleanup. One member should also be assigned to make arrangements for equipment that needs to be brought in, and staffing areas with people responsible for securing, preparing, operating, and returning equipment.

### *Step 12: Get the Word Out*

Review your purpose statement, theme(s), and objectives, and then prepare a fact sheet that you can give the people in charge of outreach at your agency (See Worksheet). Ask them to help you create a consistent and memorable image for your event and put together a marketing campaign.

If you decide to do your own publicity, there are chapters in this manual that tell you how to (See Tabs):

- Get **publicity**, including coverage by newspapers, newsletters, radio, and television
- Produce **printed materials**, including invitations, leaflets, brochures, and direct mail
- Plan a paid **advertising** campaign
- Create **signage**, such as banners and billboards
- Create **exhibits** and displays for the event

Word-of-mouth is another important part of every promotion campaign. Make a list of people who could help with word-of-mouth and contact them. Friends, associates, and current and past customers can all help spread the word.

Look into listing your event with tourist organizations, such as tourism bureaus and chambers of commerce. They often include community events in their annual and seasonal calendars and newsletters.

If you plan on selling promotional items before the event, such as T-shirts, buttons, or bumper stickers, assign a committee member to research marketing opportunities. Look for a company that handles all aspects of sales promotions to help you with this aspect of your pre-event publicity.

### *Step 13: Plan Evaluation and Follow-up*

Plan a method for how you will evaluate the success of your event, usually measured by the number of attendees. Will you have someone counting heads? Or will tickets be required for entrance to your event? You may want to ask participants to fill out a questionnaire that will provide you with information about the size and nature of the audience.

The more you can determine about your audience, the better equipped you will be to plan for future events, including improved or expanded similar events or staging the same

event annually.

### How To Plan a Special Event

- Write a purpose statement.
- Identify potential markets.
- Solicit cooperators and sponsors.
- Define the theme(s).
- Set objectives.
- Consider timing.
- Design a mix of activities.
- Develop a budget.
- Choose a steering committee and coordinator.
- Create a timeline.
- Choose a site.
- Get the word out.
- Plan for evaluation and follow-up.

SUMMARY

OUTREACH

Special Events

## *Special Event Worksheet*

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### **PURPOSE**

What is the main purpose of staging this event? Write a purpose statement.

### **AUDIENCE**

Describe the audience that will be interested in the event.

### **THEME**

Identify the theme for event.

### **OBJECTIVES**

How will the event motivate the public to support the agency?

How will the event improve staff morale?

How will the event help recruit volunteers?

List other objectives for event.

**OUTREACH** **Special Events**

**SUPPORTERS**

Who is willing to sponsor or cooperate to support the event?

Sponsors: \_\_\_\_\_

Cooperators: \_\_\_\_\_

Volunteers: \_\_\_\_\_

**TIMING**

What is the best date for the customers? \_\_\_\_\_

The Agency? \_\_\_\_\_

How much time will we need to organize and publicize the event successfully?  
\_\_\_\_\_

What is the best day(s) to stage the event? \_\_\_\_\_

**ACTIVITIES**

Prepare a table of activities listing what each will require.

ACTIVITY	Pre-event preparation	Displays/facilities	Printed materials	Publicity	Organizer	Follow-up

**OUTREACH Special Events**

**BUDGET**

Expenses Total \_\_\_\_\_

Income Total: (In-House Funds, Sponsor Donation, and Event Revenues) \_\_\_\_\_

Anticipated Profit/Loss: \_\_\_\_\_

**STEERING COMMITTEE CHECKLIST**

- Select steering committee chairperson.
- Select sub-committees chairperson.
- Prepare job descriptions/committee objectives.
- Recruit committee members.
- Assign programs and activities to coordinators.
- Name a publicity coordinator.
- Name a legal and insurance coordinator.
- Name a site coordinator.
- Assign sponsorship solicitation.
- Assign volunteer coordination duties.

**TIMELINE EXAMPLE**

ACTIVITY	JAN	FEB	MAR	APRIL	MAY
Animal Food Booth		-----	-----		
T-shirt sales booth				-----	-----

**OUTREACH****Special Events****SITE CHECKLIST**

- Select potential site.
- Develop activity layout.
- Assign visitor control, parking security, set-up, and clean up duties.
- List the technical requirements, (sound, light, stage, etc.) required and the equipment and personnel who will handle the equipment and technical details for each area.

**PUBLICITY PREPARATION**

Prepare to meet with public relations specialist to arrange for media coverage, printed materials, and other promotion and marketing by preparing a written document that answers the following questions:

1. State the goals of the special event promotion and marketing campaign. What, specifically, do we want to accomplish?
  
2. State the theme(s) of the campaign. What do we want people to do?
  
3. Describe the target audience for the event.
  - a) Who is most likely to respond to the event?
  
  - b) What do we know about these people?
  
4. Where and when do we want to reach this market and when and where do we want them to buy?
  
5. When should the media campaign begin and end?

**OUTREACH** **Special Events**

6. State how printed materials will be used in the campaign.

- a) What signs, posters, leaflets, and brochures are required?
  
- b) When and how should materials be distributed?

7. State how displays will be used to promote the event. What can we show people to encourage them to attend the event?

8. State how publicity might be generated (radio, television, newspaper, and magazine).

- a) What is news-worthy about our event?
  
- b) What media do our customers watch, read, or listen to?